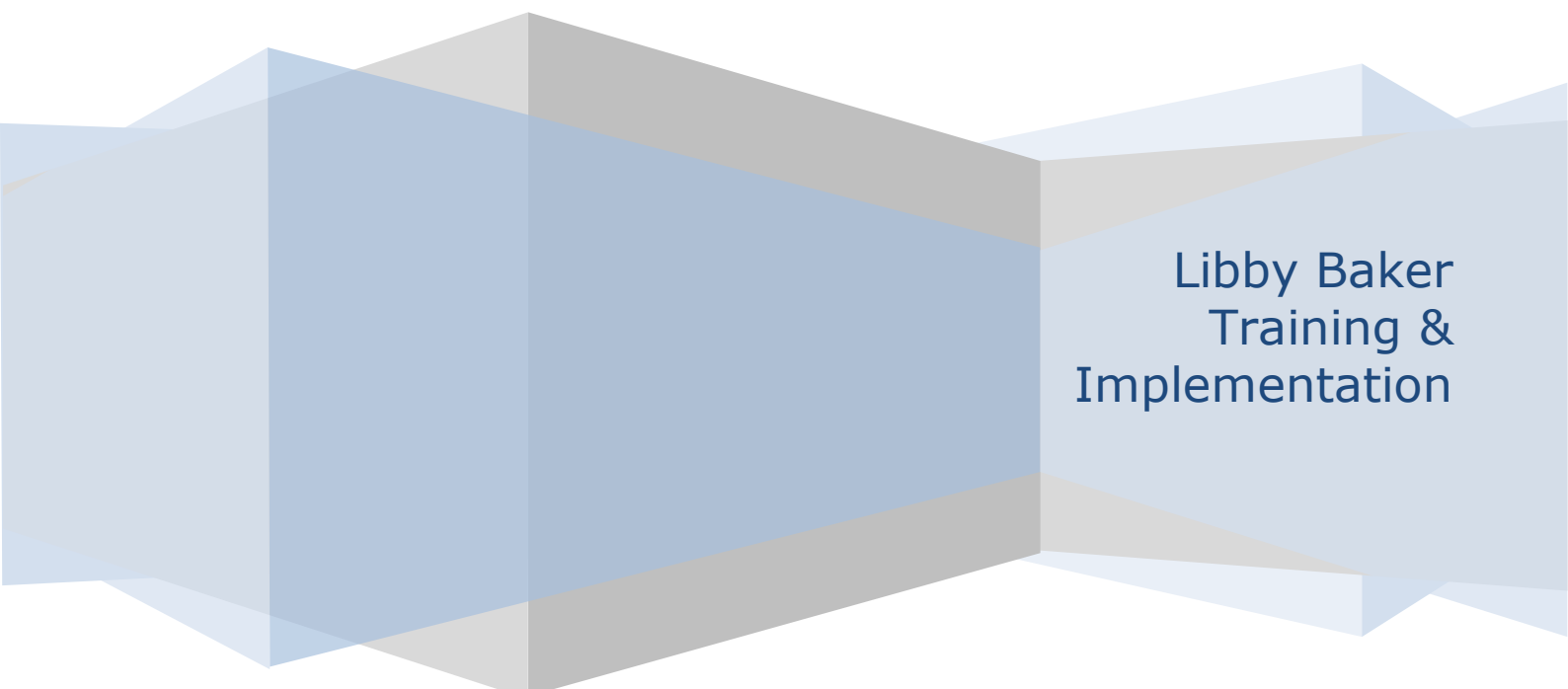


PROJECT 2010

Getting Started

MS Office Ltd



Libby Baker
Training &
Implementation

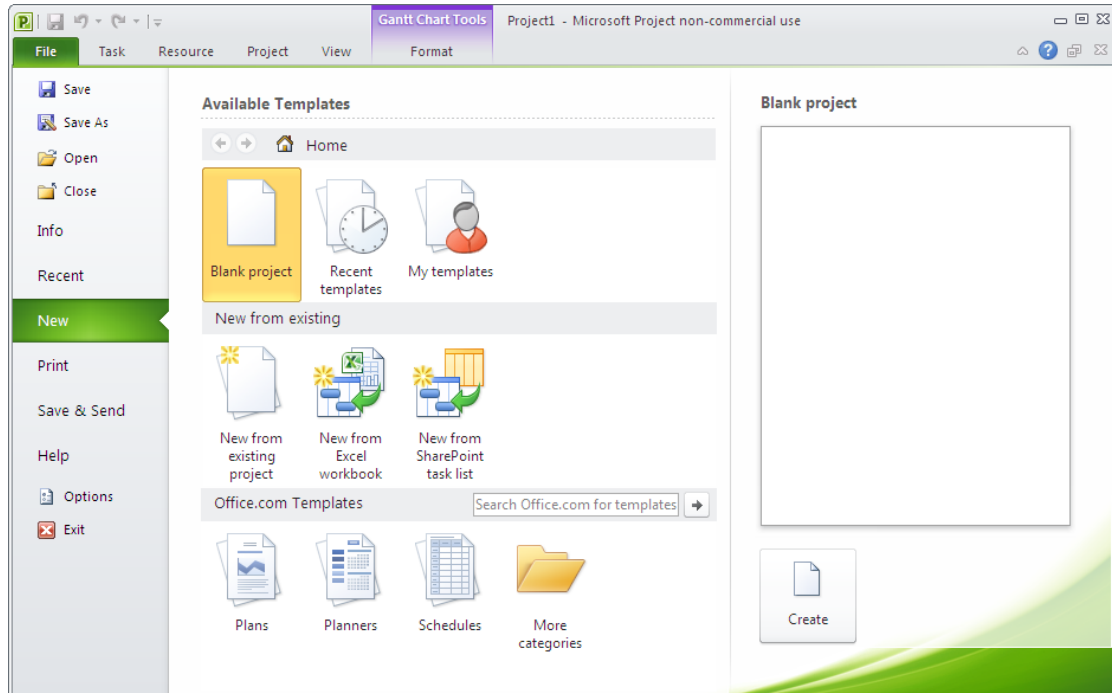
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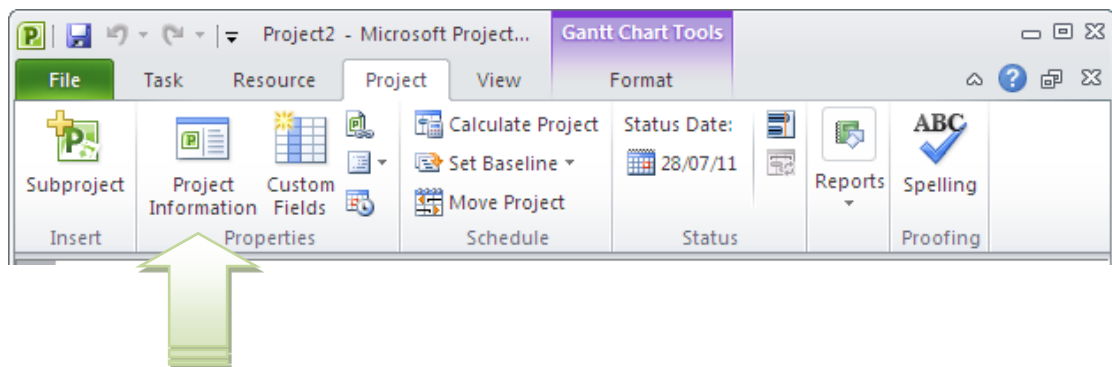
Creating and Preparing a New Project

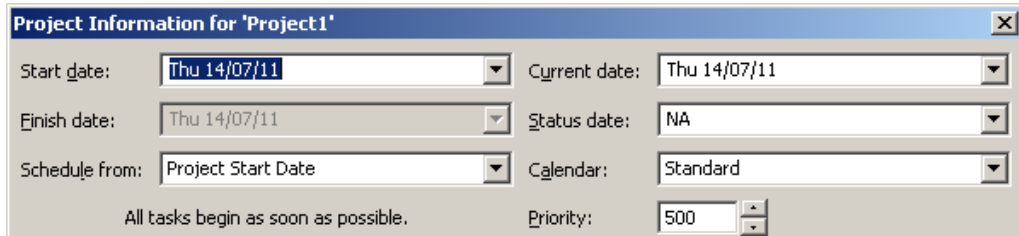
The first step in creating a schedule is opening a new file and designating a project start date or finish date, as well as other general project information.

1. Select File New Blank project, Create



2. From the Project Tab, select Project Information





Project Information for 'Project1'

Start date: Thu 14/07/11 Current date: Thu 14/07/11

Finish date: Thu 14/07/11 Status date: NA

Schedule from: Project Start Date Calendar: Standard

All tasks begin as soon as possible. Priority: 500

For most projects, it is easier to schedule a project from a start date and let Project determine the finish date based on the tasks, durations, dates, and other information you enter.

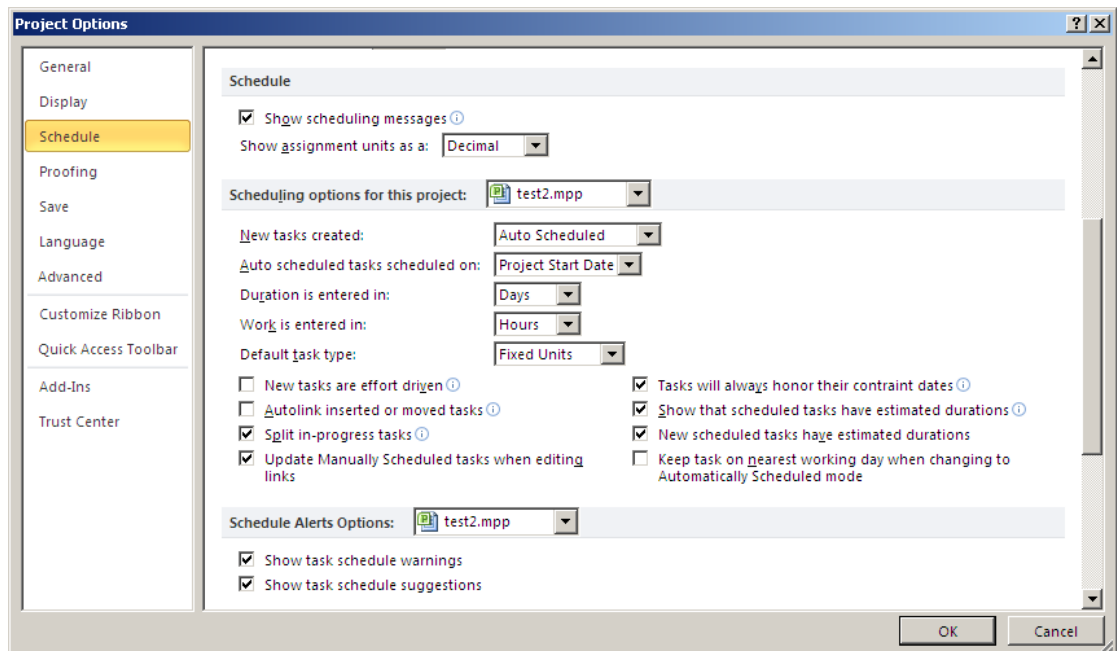
Note: If you don't enter a project start date, Project automatically uses the current date.

Project Defaults

Because these options are all defaults it is sensible to set them before entering any tasks.

1. Set project defaults in File Options.
2. Select the Calendar Section

Note: Change these settings and also match the calendar using the Change Working Time command on the Project tab in the ribbon.
3. Select the Schedule Section
 - Under New Tasks created: Select Auto Scheduled



Project Options

General
Display
Schedule
Proofing
Save
Language
Advanced
Customize Ribbon
Quick Access Toolbar
Add-Ins
Trust Center

Schedule

Show scheduling messages

Show assignment units as a: Decimal

Scheduling options for this project: test2.mpp

New tasks created: Auto Scheduled

Auto scheduled tasks scheduled on: Project Start Date

Duration is entered in: Days

Work is entered in: Hours

Default task type: Fixed Units

New tasks are effort driven

Autolink inserted or moved tasks

Split in-progress tasks

Update Manually Scheduled tasks when editing links

Tasks will always honor their constraint dates

Show that scheduled tasks have estimated durations

New scheduled tasks have estimated durations

Keep task on nearest working day when changing to Automatically Scheduled mode

Schedule Alerts Options: test2.mpp

Show task schedule warnings

Show task schedule suggestions

OK Cancel

5. After reviewing the other Tabs in Options choose OK to save.

6. Select Change Working Time on Project tab in the ribbon

Note: Match the settings here to those under File Options Calendar

Entering and Scheduling Tasks

Task Types

Summary task

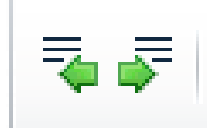
A task that is made up of subtasks and that also summarises those subtasks.

Subtask

A task that is part of a summary task. The subtask information is consolidated into the summary task.

	Task Name	Duration
Summary task	1 Inventory and research	11d
	2 Inventory artifacts	4d
Subtasks	3 Arrange for loans from ot	3d
	4 Pick up donations	4d
	5 Design and development	19d

When you indent a task it becomes a subtask of the nearest preceding task.



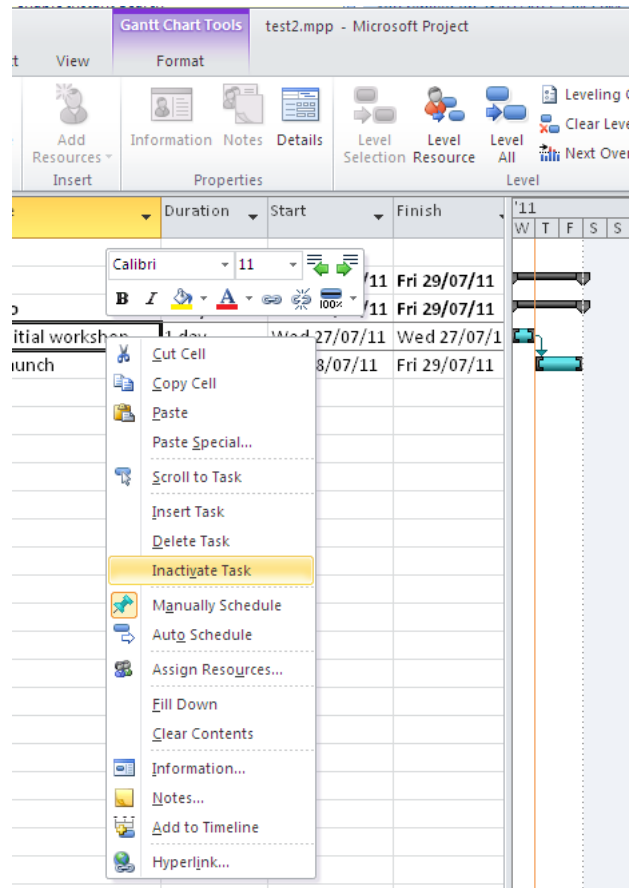
Notes:

Inactive tasks

(New in 2010)

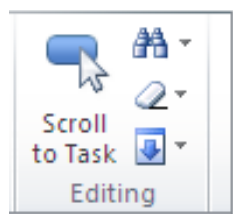
You can make tasks inactive and still retain them in the project. Inactive tasks often have critical information (such as actuals and cost information) that can be valuable for archival purposes.

- Right click on any Task and choose Inactivate Task.



Scroll to Task

Select any task and then use Scroll to Task to find the associated Gantt bar.



Notes:

Linking Tasks and Setting Dependencies

Linking

Task Tab, Schedule



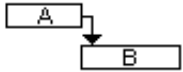
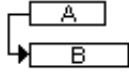
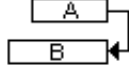
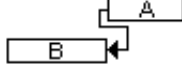
Assigns a finish-to-start task relationship to the currently selected tasks.

- To link tasks, select the tasks you want to link, and then choose Link Tasks. Project links the start of the last task to the finish of the task above it.
- If you select more than two tasks, Project links the start of each selected task to the finish of the selected task above it.

Note: Use your mouse to drag a Gantt bar and link it to another task.

Types of Task Dependencies

In a project, linking establishes a dependency between tasks. When you link tasks, you define a relationship between their start and finish dates. There are four kinds of task relationships: finish-to-start (FS), start-to-start (SS), finish-to-finish (FF), and start-to-finish (SF).

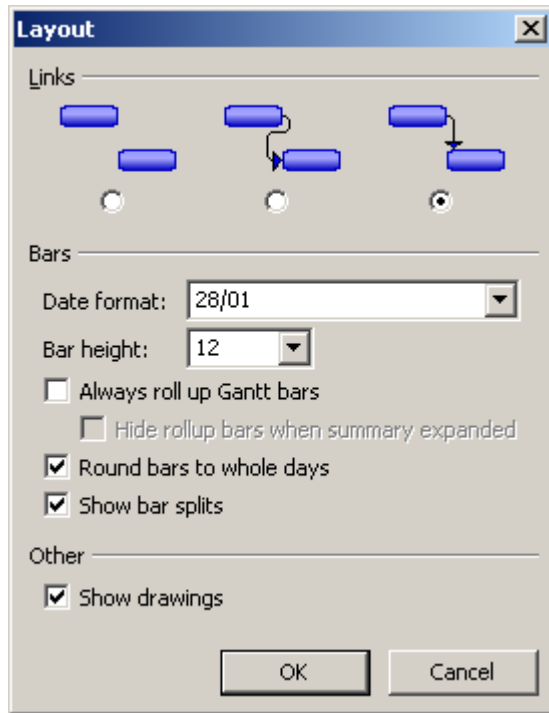
Finish-to-start (FS)	The task (B) cannot start until another task (A) finishes.	
Start-to-start (SS)	The task (B) cannot start until another task (A) starts.	
Finish-to-finish (FF)	The task (B) cannot finish until another task (A) finishes.	
Start-to-finish (SF)	The task (B) cannot finish until another task (A) starts.	

The default for Project is Finish-to-start.

Notes:

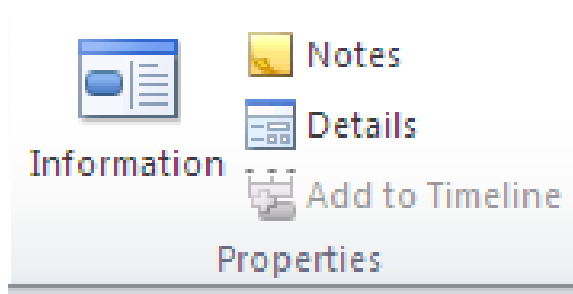
Gantt Chart Tools

Under Gantt Chart Tools use Format Layout to customise links



Notes:

Task Information



Double-click any task (not summary level) to view the information.

Use this command to add new tasks and to edit and update information for selected tasks.

This command is available for the Gantt Chart, Task Sheet, Calendar, PERT Chart, and task forms.

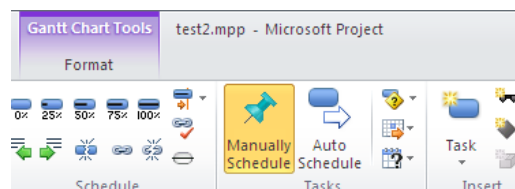
- This command changes to Recurring Task Information when you select a summary recurring task.
- This command changes to Resource Information when you're in a resource view.
- You can also choose this command by double-clicking a task in the table in the Gantt Chart and Task Sheet; by double-clicking a task bar in the Calendar; and by double-clicking a PERT box on the PERT Chart.

Note: To change information for several tasks, select them and then choose Task Information.

Manually Schedule/Auto Schedule

(New in 2010)

You can place a manually scheduled task placed anywhere in your schedule, and Project won't move it.



- If your default for new tasks is Auto Schedule it can be changed for any task by selecting it and choosing Manually Schedule.

Turn off effort-driven scheduling

As you assign or remove people from a task, Project by default decreases or increases the duration of the task, but will not change the total work on the task. You may want to change this behaviour to more accurately reflect what happens on a particular task when resources are added or removed. For example, you may want to see the total work increase as you add more people to a particular task.

1. In the Task Name field, select the tasks for which you want to turn off effort-driven scheduling.
2. Click Task Information and then click the Advanced Tab.
3. Clear the Effort driven check box.

The Task Information command opens a tabbed dialogue box. Choose the appropriate tab for the type of information you want to view or enter.

General Tab	To specify basic task information such as a task name, duration, start and finish, and percent complete.
Predecessors Tab	Specifies information about the selected task's relationships. Use this to insert lead or lag. (See page for definitions)
Resources Tab	Specifies information about resources assigned to the task.
Advanced Tab	Specifies additional information about the task such as milestones, WBS codes or constraints. (See constraint table)
Notes Tab	Allows you to type or review notes for the selected task.
Custom Fields	Change settings to your Custom Fields

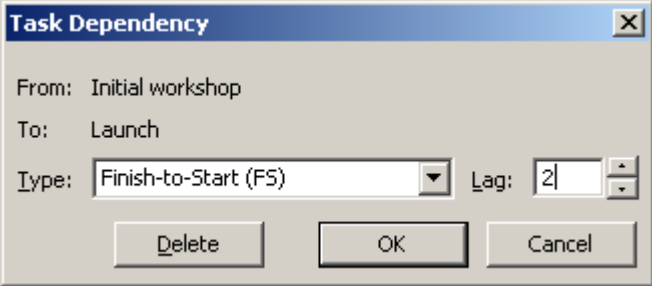
Notes:

Lead and Lag

Double-click on any dependency line

Lag time

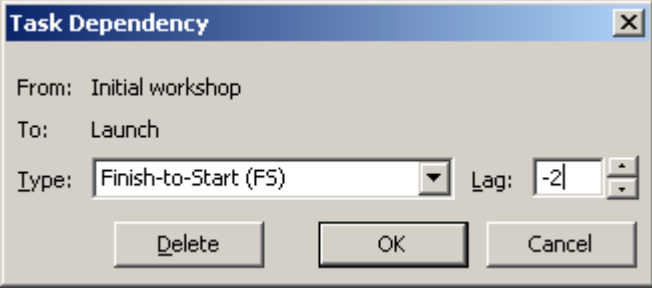
A **delay** between tasks that have a dependency. For example, if you need a two-day delay between the finish of one task and the start of another, you can establish a finish-to-start relationship and specify a two-day lag time. You enter lag time as a **positive value**.



The screenshot shows the 'Task Dependency' dialog box. The 'From' field is 'Initial workshop' and the 'To' field is 'Launch'. The 'Type' is set to 'Finish-to-Start (FS)'. The 'Lag' field contains the value '2'. There are three buttons at the bottom: 'Delete', 'OK', and 'Cancel'.

Lead time

An **overlap** between tasks that have a dependency. For example, if a task can start when its predecessor is half finished, you can specify a finish-to-start relationship with a lead time of 50 percent for the successor task. You enter lead time as a **negative value**.



The screenshot shows the 'Task Dependency' dialog box. The 'From' field is 'Initial workshop' and the 'To' field is 'Launch'. The 'Type' is set to 'Finish-to-Start (FS)'. The 'Lag' field contains the value '-2'. There are three buttons at the bottom: 'Delete', 'OK', and 'Cancel'.

Notes:

Constraints

The following table lists and describes the constraints available in Microsoft Project. Set constraints using the Advanced Tab in the Task Information Menu.

Constraint	Description
As Late As Possible (ALAP)	Schedules the task as late as it can occur in the schedule without delaying subsequent tasks. <i>Do not enter a constraint date with this constraint.</i>
As Soon As Possible (ASAP) This is the default constraint for tasks.	Schedules the task to begin as early as it can occur. <i>Do not enter a constraint date with this constraint.</i>
Finish No Earlier Than (FNET)	Schedules the task to finish on or after the constraint date. Use it to ensure that a task does not finish before a certain date.
Finish No Later Than (FNLТ)	Schedules the task to finish on or before the constraint date. Use it to ensure that a task does not finish after a certain date.
Must Finish On (MFO)	Schedules the task to finish on the constraint date. Sets the early, scheduled, and late finish dates to the date you type, and anchors the task in the schedule.
Must Start On (MSO)	Schedules the task to start on the constraint date. Sets the early, scheduled, and late start dates to the date you type, and anchors the task in the schedule.
Start No Earlier Than (SNET)	Schedules the task to start on or after the constraint date. Use it to ensure that a task does not start before a specified date.
Start No Later Than (SNLT)	Schedules the task to start on or before the constraint date. Use it to ensure that a task does not start after a specified date.

Adding People and Equipment to Your Project

(aka Resources)

Entering Resource Info in Sheet View

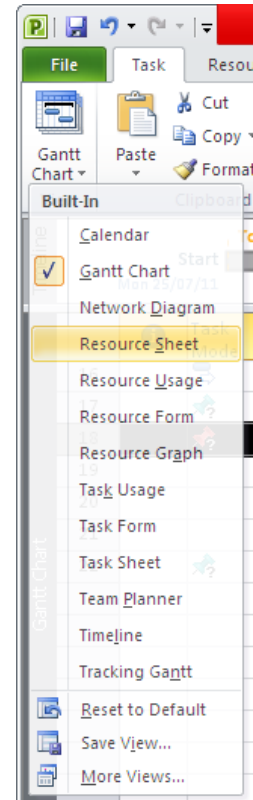
1. Select Resource Sheet View
2. In the Resource Name field, type a resource name.
3. In the Initials field, type the resource initials.
4. If you want to specify the group to which the resource belongs, type the group name in the Group field.

For example, if Harry Sweet is one of several geophysicists in your project, you can type Geophysicist in the Group field.

5. In the Max. Units field, type the number of units of the resource that are available.

For example, if Wireline Unlimited is the resource and three people are available, type 3 in the Max. Units field. Or if a resource is available only half-time, type 0.5 in the Max. Units field.

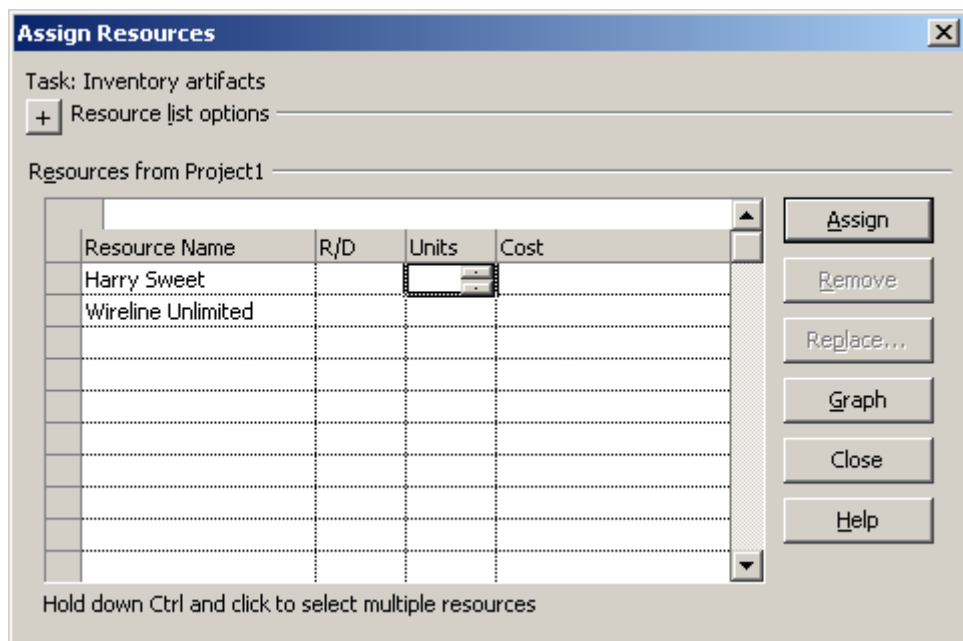
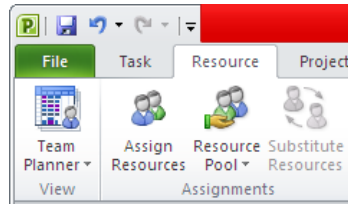
6. In the Std. Rate field, type the rate and unit of payment.



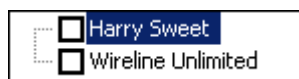
Notes:

Assigning Resources

1. Return to the Gantt Chart View
2. Select a task.
3. Click the Resource Assignment button on the Resource tab.



4. Or type a new resource name in the resource column.



Notes:

Evaluating and Adjusting Your Schedule

To determine whether your schedule has problem areas that require adjustments, you first analyse the schedule and evaluate the use of time, resources, and costs. Evaluating your schedule in various ways helps you identify:

- Task relationships and the critical path
- Slack time in the schedule
- Constraints on tasks
- Overallocated resources
- Cost of tasks

In a Project schedule, tasks can be related to each other in a variety of ways. By using these relationships effectively, you can modify the critical path and shorten your schedule.

Critical path

The series of tasks that must be completed on schedule for a project to finish on schedule. Each task on the critical path is a critical task.

When you need to keep tasks on the critical path on schedule, you can adjust the task relationships and resource assignments of noncritical tasks to use slack in the schedule.

Slack time is the amount of time a task can be delayed without delaying the finish date of the schedule.

If a task that has slack finishes late, it may not affect the rest of the schedule. Most schedules have some noncritical tasks with slack.

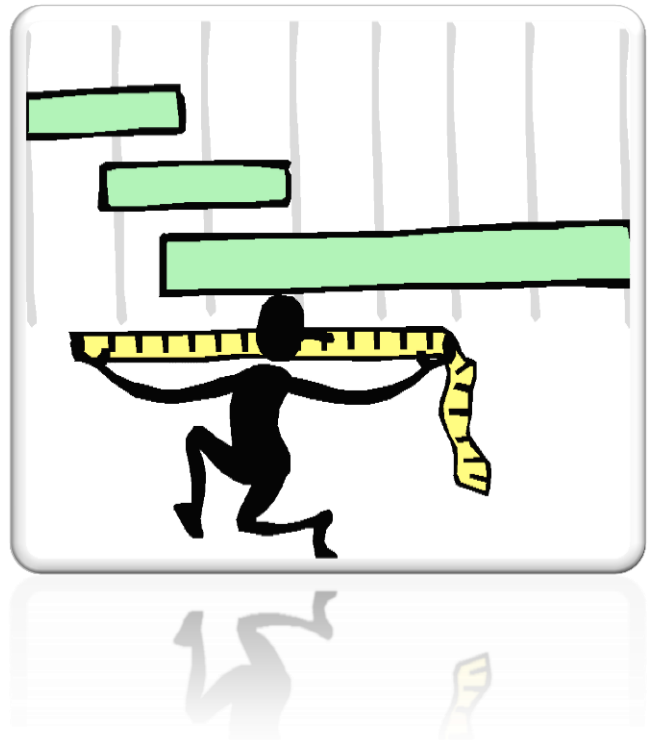
Constraints on tasks also help you control the start or finish dates of important tasks. At various stages in your project, check the constraints on tasks, particularly critical tasks, to make sure they are absolutely necessary, because constraints can limit your schedule's flexibility.

When you evaluate your schedule, be sure that you have allocated your resources efficiently. Resources are overallocated when they are assigned more work than they can do in their scheduled working hours. Resources are underallocated when they are not fully assigned.

Tracking the Progress of Your Project

Tracking your project is a three-step process:

1. Create a baseline plan based on your preliminary schedule.
2. Periodically update your schedule to reflect the progress of the project.
3. Compare the updated information in your schedule to the baseline plan to determine how closely your progress matches your plan.

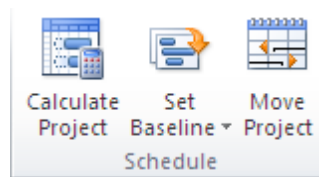


Setting a Baseline

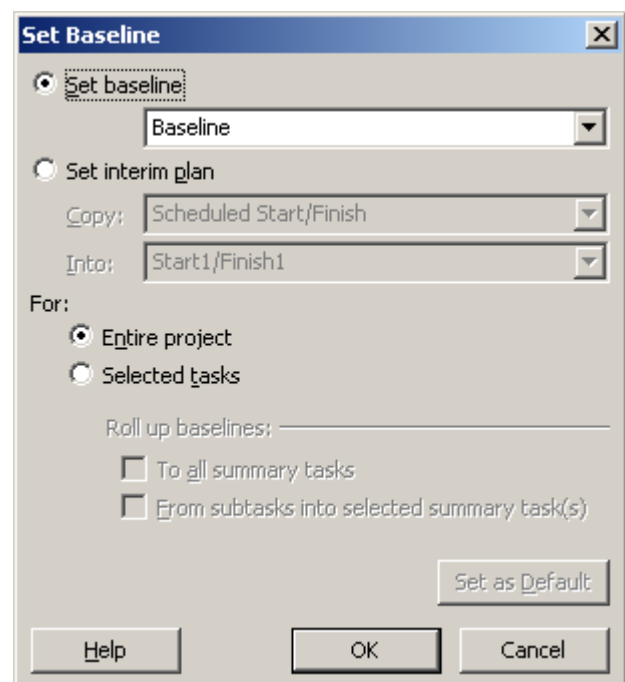
A baseline plan provides a basis for the comparison of costs, work, and scheduled dates as you track the progress of your schedule. By comparing the information in your baseline plan to current information, you can monitor the progress of your project to ensure that tasks are on schedule, resources are completing their work in the time allocated, and costs are not exceeding your budget.

Setting Baseline or Interim Plans

- Under the Project Tab select Set Baseline.

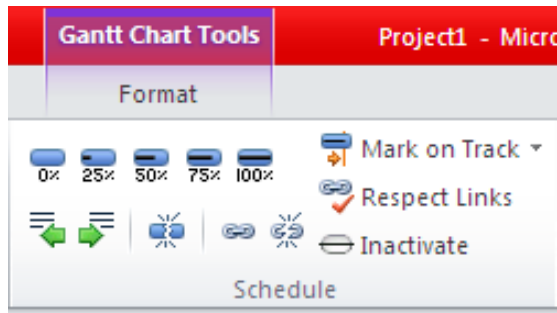


After creating a baseline plan, you can modify it to accommodate changes in the project such as combining, adding, or deleting tasks. In addition to the baseline plan, you can save interim plans for comparing scheduled dates. Interim plan information is useful for maintaining historical data, so that you can plan similar future projects more accurately.



Work Completed

- In the Gantt Chart or Tracking Gantt view , select the task for which you want to update progress.



By default, Microsoft Project indicates the percentage of the task that is complete on the Gantt bar chart as a thin, black line drawn horizontally through the middle of each task bar.

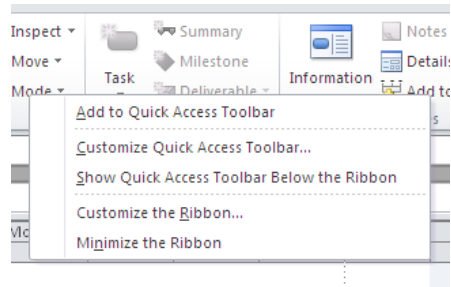
Notes:

Customising MS Project

Add to Quick access Toolbar +

Right click on any Ribbon Command

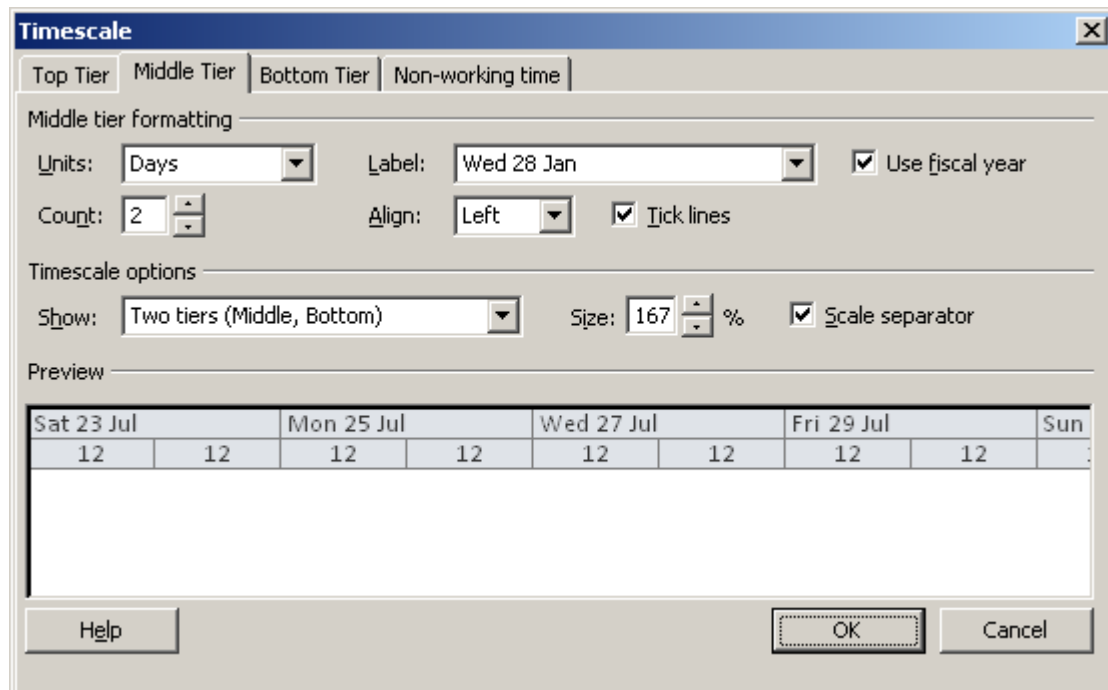
- Add item to Quick Access Toolbar
- Customize Quick Access Toolbar
- Customize the Ribbon



Customising the Screen

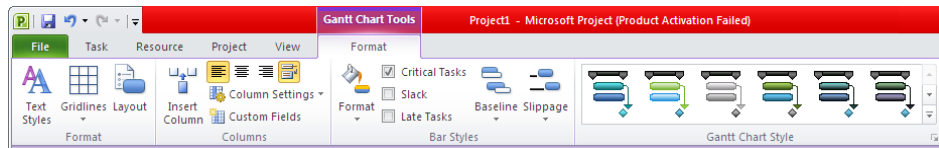
By double clicking or pressing your right button on various parts of the screen you will see the options available.

You can insert columns and delete columns. You can rename standard columns to suit your industry. If you double-click on the Timescale side of the Gantt chart the following dialogue box will appear.

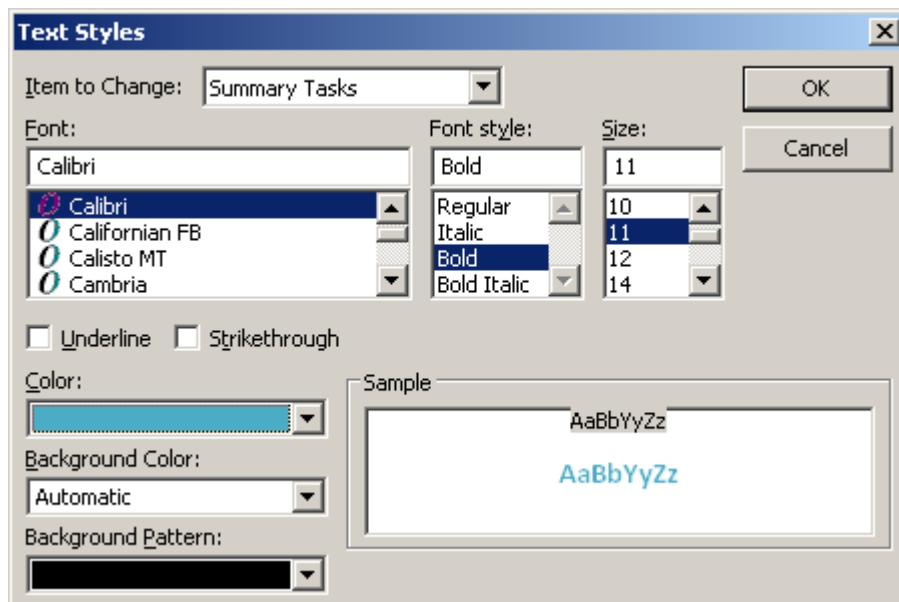


Formatting

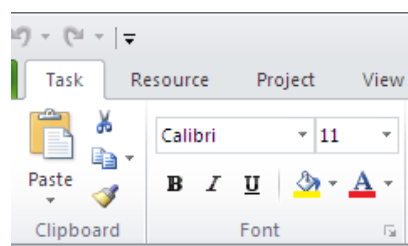
Text Styles



- Use Format Text Styles to change types of tasks ie Summary Tasks



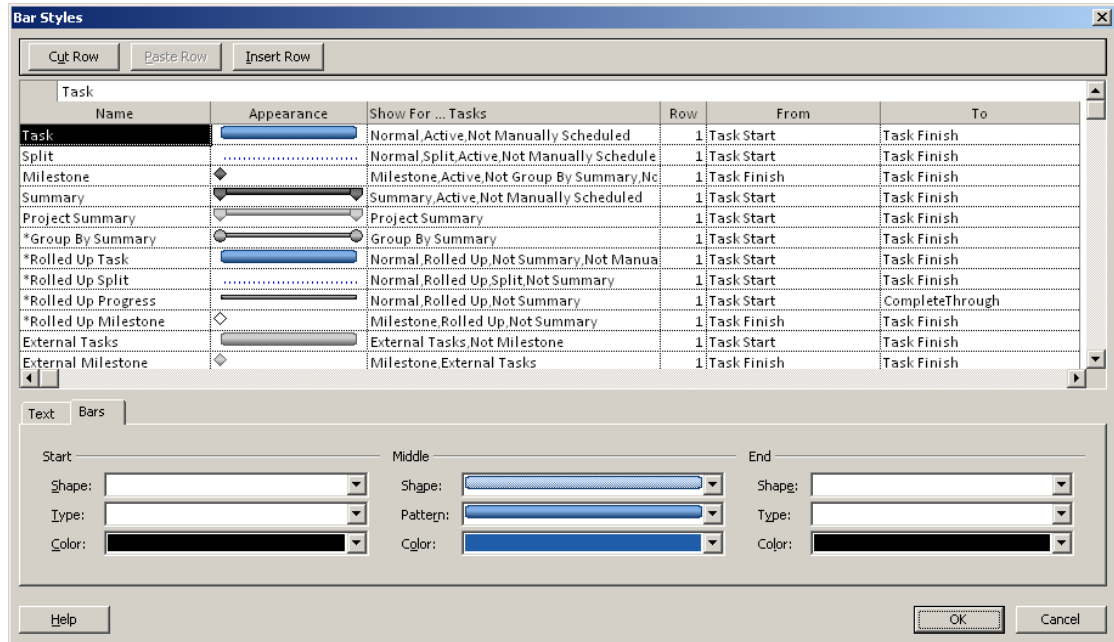
- To format an individual task highlight the task and then use the Font menu under the Task Tab



Notes:

Bar Styles

- Use Format Bar Styles under the Format icon



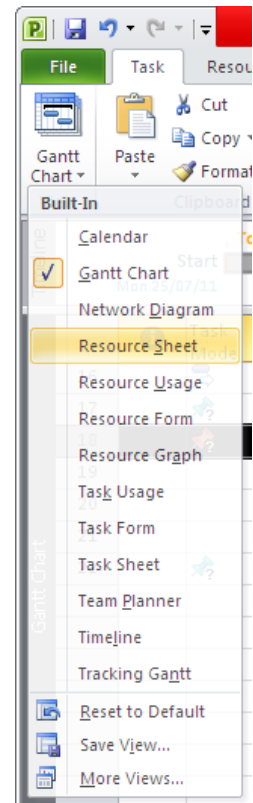
- To change an individual task, highlight that task and select Format Bar

Notes:

Views

Under the Gantt Chart Icon in the Task tab select from the following views. Project creates one file with a variety of views.

View	Description
Calendar	Scheduled tasks in a calendar format. Use to show the tasks scheduled in a specific week or range of weeks.
Gantt Chart	A list of tasks and related information, and a Gantt bar chart showing tasks and durations over time. Use to enter and schedule a list of tasks.
Network Diagram	A network diagram showing all tasks and task relationships. Use to create and fine-tune your schedule in a flowchart format.
Resource Sheet	A list of resources and related information. Use to enter and edit resource information in a spreadsheet-like format.
Resource Usage	A list of resources showing allocation, cost, and work information for each resource, over time. Use to show cost and work allocation information for each resource.
Resource Form	A form you use to enter and edit basic and detailed information about a specific resource.
Resource Graph	A graph showing resource information over time. Use to display information about a single resource or selected resources over time.
Task Sheet	A list of tasks and related information. Use to enter and schedule a list of tasks.
Task Usage	Lists for each task the resources assigned to it and the amount of work that each resource has performed over time, whether per day, week, month, or other time increment.
Task Form	A form you use to enter and edit basic and detailed information about a specific task.



View	Description
Team Planner (New in 2010)	See at a glance what your team members are working on and move tasks from one person to another. You can also view and assign unassigned work, view overallocations, and see task names as well as resource names. If a resource is overallocated, all you need to do is drag a task from one resource to another, and the overallocation disappears.
Timeline (New in 2010)	Project 2010 includes a Timeline view that is automatically displayed above other views, showing a concise overview of the entire schedule. You can add tasks to the timeline and even print it for an attractive summary report of the entire project. Or you can paste it into an e-mail for an instant report with no fuss.
Tracking Gantt	A list of tasks and information about baseline dates and actual dates. Use to compare baseline dates with actual dates.

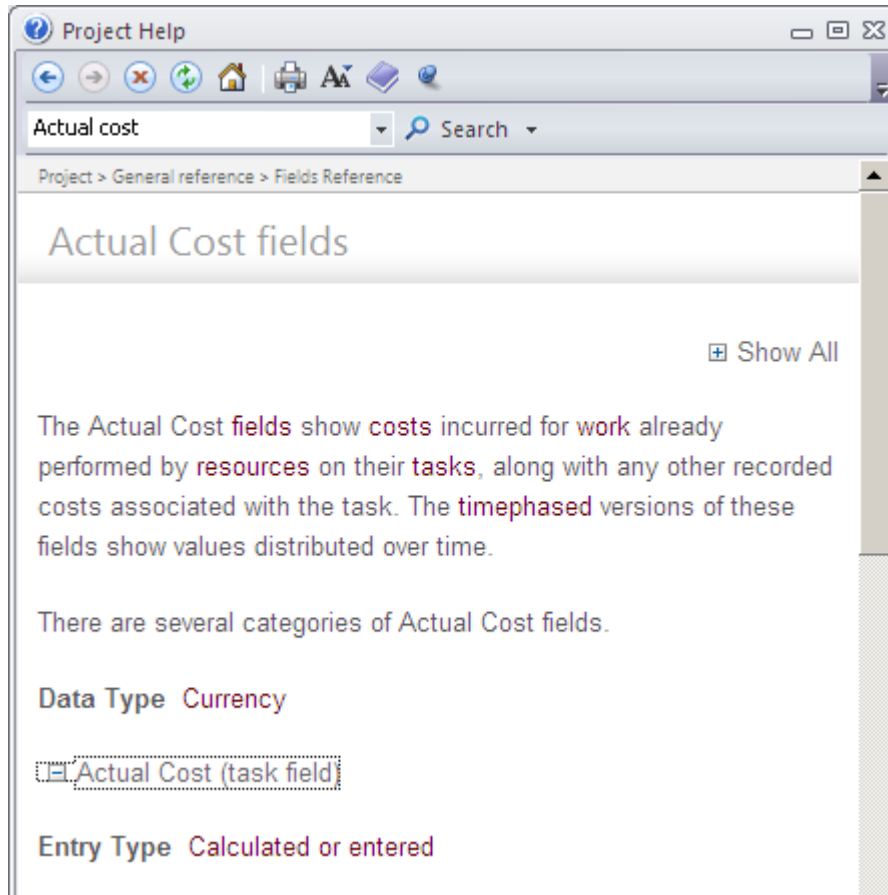
Notes:

Help

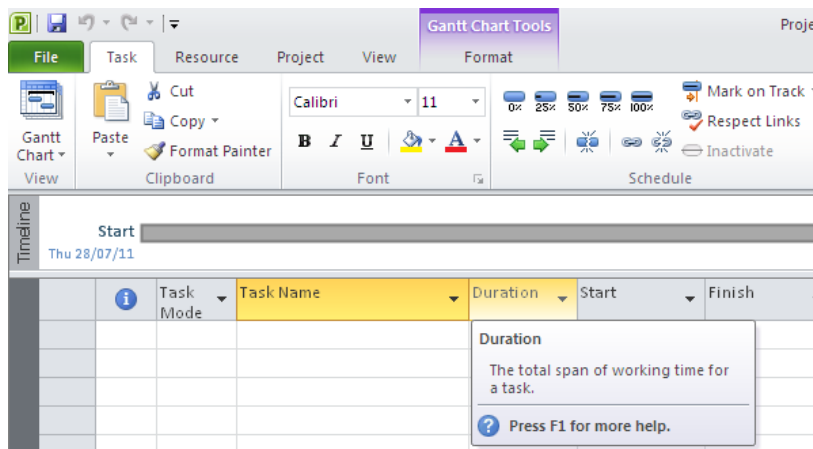
Press F1 or use the Help icon in the top right corner



Search by key word



Pause on Field Headings for a brief description and Press F1 for more help.



Notes: